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Terry Hamer

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EXAMINER

DAYE, CHELCIE L

ART UNIT

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**Please find below and/or attached an Office communication concerning this application or proceeding.**

The time period for reply, if any, is set in the attached communication.

<b>Office Action Summary</b>	<b>Application No.</b> 10/675,431	<b>Applicant(s)</b> HAMER, TERRY	
	<b>Examiner</b> CHELCIE DAYE	<b>Art Unit</b> 2161	

-- The MAILING DATE of this communication appears on the cover sheet with the correspondence address --

### Period for Reply

A SHORTENED STATUTORY PERIOD FOR REPLY IS SET TO EXPIRE 3 MONTH(S) OR THIRTY (30) DAYS, WHICHEVER IS LONGER, FROM THE MAILING DATE OF THIS COMMUNICATION.

- Extensions of time may be available under the provisions of 37 CFR 1.136(a). In no event, however, may a reply be timely filed after SIX (6) MONTHS from the mailing date of this communication.
- If NO period for reply is specified above, the maximum statutory period will apply and will expire SIX (6) MONTHS from the mailing date of this communication.
- Failure to reply within the set or extended period for reply will, by statute, cause the application to become ABANDONED (35 U.S.C. § 133). Any reply received by the Office later than three months after the mailing date of this communication, even if timely filed, may reduce any earned patent term adjustment. See 37 CFR 1.704(b).

### Status

- 1) ☒ Responsive to communication(s) filed on 05 February 2008.
- 2a) ☒ This action is **FINAL**.                      2b) ☐ This action is non-final.
- 3) ☐ Since this application is in condition for allowance except for formal matters, prosecution as to the merits is closed in accordance with the practice under *Ex parte Quayle*, 1935 C.D. 11, 453 O.G. 213.

### Disposition of Claims

- 4) ☒ Claim(s) 1-84 is/are pending in the application.
- 4a) Of the above claim(s) 18-36,60-66 and 81-84 is/are withdrawn from consideration.
- 5) ☐ Claim(s) \_\_\_\_\_ is/are allowed.
- 6) ☒ Claim(s) 1-17,37-54,56-59,67,69,70 and 74-80 is/are rejected.
- 7) ☐ Claim(s) \_\_\_\_\_ is/are objected to.
- 8) ☐ Claim(s) \_\_\_\_\_ are subject to restriction and/or election requirement.

### Application Papers

- 9) ☐ The specification is objected to by the Examiner.
- 10) ☐ The drawing(s) filed on \_\_\_\_\_ is/are: a) ☐ accepted or b) ☐ objected to by the Examiner.  
Applicant may not request that any objection to the drawing(s) be held in abeyance. See 37 CFR 1.85(a).  
Replacement drawing sheet(s) including the correction is required if the drawing(s) is objected to. See 37 CFR 1.121(d).
- 11) ☐ The oath or declaration is objected to by the Examiner. Note the attached Office Action or form PTO-152.

### Priority under 35 U.S.C. § 119

- 12) ☐ Acknowledgment is made of a claim for foreign priority under 35 U.S.C. § 119(a)-(d) or (f).
- a) ☐ All    b) ☐ Some \*    c) ☐ None of:
1. ☐ Certified copies of the priority documents have been received.
  2. ☐ Certified copies of the priority documents have been received in Application No. \_\_\_\_\_.
  3. ☐ Copies of the certified copies of the priority documents have been received in this National Stage application from the International Bureau (PCT Rule 17.2(a)).

\* See the attached detailed Office action for a list of the certified copies not received.

### Attachment(s)

- |  |   |
|--|---|
| 1) <input checked="" type="checkbox"/> Notice of References Cited (PTO-892)          | 4) <input type="checkbox"/> Interview Summary (PTO-413)           |
| 2) <input type="checkbox"/> Notice of Draftsperson's Patent Drawing Review (PTO-948) | Paper No(s)/Mail Date. _____                                      |
| 3) <input type="checkbox"/> Information Disclosure Statement(s) (PTO/SB/08)          | 5) <input type="checkbox"/> Notice of Informal Patent Application |
| Paper No(s)/Mail Date _____  | 6) <input type="checkbox"/> Other: _____                          |

### DETAILED ACTION

1. This action is issued in response to applicant's amendment filed February 05, 2008.
2. Claims 1-84 are presented. No claims are added and claims 55,68, and 71-73 remain cancelled.
3. Claims 18-36,60-66, and 81-84 remain withdrawn.
4. Claims 1-17,37-54,56-59,67,69-70, and 74-80 are pending.

### ***Claim Rejections - 35 USC § 103***

6. The following is a quotation of 35 U.S.C. 103(a) which forms the basis for all obviousness rejections set forth in this Office action:

(a) A patent may not be obtained though the invention is not identically disclosed or described as set forth in section 102 of this title, if the differences between the subject matter sought to be patented and the prior art are such that the subject matter as a whole would have been obvious at the time the invention was made to a person having ordinary skill in the art to which said subject matter pertains. Patentability shall not be negated by the manner in which the invention was made.

7. **Claims 1-17,37-54,56-59,67,69-70,and 74-80 are rejected under 35 U.S.C. 103(a) as being unpatentable over de l'Etraz (US Patent No. 6,324,541) filed June 5, 2000, in view of Cheah (US Patent No. 7,003,546) filed October 13, 1999.**

Regarding Claims 1,37,54,and 67, de l'Etraz discloses a relationship management system, comprising:

a first database that stores a plurality of user collections, wherein each user collection is accessible by a user of the system and including one or more first contact files, each first contact file including contact data that is unique to a

particular one of the first contact files (Fig.1; columns 19-20, lines 38-67 and 1-38, respectively, de l'Etraz)<sup>1</sup>;

a second database that stores a firm collection, wherein each firm collection is accessible by an administrator of the system, the firm collection including a second contact file for each different first contact file included in the plurality of user collections, each second contact file having at least a portion of data in common with one of the first contact files (Fig.1; columns 20-21, lines 40-67 and 1-55, respectively, de l'Etraz). However, de l'Etraz is silent with respect to an administration routine stored in a memory and adapted to be executed on a processor to detect a change made to the common data of one of the first contact files within one or more of the plurality of user collections, to classify the change as one or more of add, edit, delete, format change, and suspect change, and to send a message including the classified change to the administrator of the system; a change management routine to receive a response to the message, and to process the response by one or more of approving, rejecting, or following-up on the change; wherein approving the change prompts the relationship management system to make the change to the common data of the corresponding second contact file within the firm collection and to make the change to the common data of the remaining user collections. On the other hand, Cheah discloses an administration routine stored in a memory and adapted to be

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<sup>1</sup> Examiner Notes: The separation of the user collections is accomplished by using an "OwnerId" identifier within the database. The use of the owner record identifier is used to not only separate (i.e., distinguish) the data but also separate the several users of the system (see column 11, lines 13-21 and Table 1B, de l'Etraz).

executed on a processor (column 29, lines 38-59, Cheah) to detect a change made to the common data of one of the first contact files within one or more of the plurality of user collections (column 26, lines 42-44, and column 29, lines 25-37, Cheah), to classify the change as one or more of add, edit, delete, format change, and suspect change, and to send a message including the classified change to the administrator of the system (column 23, lines 30-64; column 25, lines 52-67; column 30, lines 43-64; and column 32, lines 19-23, Cheah); a change management routine to receive a response to the message, and to process the response by one or more of approving, rejecting, or following-up on the change (column 18, lines 27-38 and columns 18-19, lines 53-67 and 1-12, respectively, Cheah); wherein approving the change prompts the relationship management system to make the change to the common data of the corresponding second contact file within the firm collection and to make the change to the common data of the remaining user collections (column 19, lines 39-46 and column 20, lines 11-18 and column 30, lines 43-64, Cheah). De l'Etraz and Cheah are analogous art because they are from the same field of endeavor of storing, processing, and displaying contact information. It would have been obvious to one of ordinary skill in the art at the time of the invention to incorporate Cheah's teachings into the de l'Etraz system. A skilled artisan would have been motivated to combine as suggested by Cheah at column 2, lines 47-61, in order to control the use of corporate and user information, by updating previous information, facilitating registration, and disabling certain users from

further use. As a result, improving approaches to automatically distribute and update contact information.

Regarding Claims 2 and 38, the combination of de l'Etraz in view of Cheah, disclose the relationship management system further including a user collection change routine adapted to make a change to the common data of a contact file associated with the particular contact within a second one of the user collections based on the change made to the common data of the corresponding second contact file associated with the particular contact within the firm collection (column 9, lines 45-64, Cheah).

Regarding Claims 3,39,and 70, the combination of de l'Etraz in view of Cheah, disclose the relationship management system wherein the administration routine is further adapted to provide a message to a firm administrator (column 29, lines 38-59, Cheah) reflecting the nature of the detected change made to one of the contact files associated with a particular contact within one or more of the plurality of user collections (columns 25-26, lines 52-67 and 1-3, respectively, Cheah).

Regarding Claims 4 and 40, the combination of de l'Etraz in view of Cheah, disclose the relationship management system wherein the administration routine is further adapted to enable the firm administrator to accept or reject the

detected change before the administration routine makes the change to the common data of the corresponding second contact file associated with the particular contact within the firm collection (column 22, lines 8-50, Cheah).

Regarding Claims 5,41,and 56, the combination of de l'Etraz in view of Cheah, disclose the relationship management system wherein the administration routine includes a rule database that stores rules pertaining to the manner in which the detected change is to be processed (columns 19-20, lines 62-67 and 1-10, respectively, Cheah).

Regarding Claims 6,42,and 57, the combination of de l'Etraz in view of Cheah, disclose the relationship management system wherein the rules are changeable by the administrator (column 23, lines 30-39, Cheah).

Regarding Claims 7,43,and 58, the combination of de l'Etraz in view of Cheah, disclose the relationship management system wherein the administration routine is further adapted to process the detected change to detect a suspected error within the detected change (column 24, lines 24-35, Cheah).

Regarding Claims 8,44,and 59, the combination of de l'Etraz in view of Cheah, disclose the relationship management system wherein the administration routine is further adapted to provide a message to a firm administrator reflecting

a description of the suspected error within the detected change (columns 14-15, lines 66-67 and 1-8, respectively, Cheah).

Regarding Claims 9,45,and 74, the combination of de l'Etraz in view of Cheah, disclose the relationship management system wherein each of the user collections includes a change attribute that specifies a manner in which a change made to the firm collection is to be reflected within the user collection (column 30, lines 43-64, Cheah).

Regarding Claims 10,46,and 75, the combination of de l'Etraz in view of Cheah, disclose the relationship management system wherein the change attribute, when set to a first value, specifies that a change to the firm collection is to be automatically made to the user collection (column 23, lines 40-47, Cheah).

Regarding Claims 11,47,and 76, the combination of de l'Etraz in view of Cheah, disclose the relationship management system wherein the change attribute, when set to a first value, specifies that a change to the firm collection is to be reported to a user having access to the user collection for which the change attribute exists (column 30, lines 55-60, Cheah).

Regarding Claims 12,48,and 77, the combination of de l'Etraz in view of Cheah, disclose the relationship management system wherein the change



attribute, when set to a first value, specifies that a change to the firm collection is to be accepted by the user having access to the user collection for which the change attribute exists before being made to the user collection for which the change attribute exists (column 25, lines 52-67, Cheah).

Regarding Claims 13,49,and 78, the combination of de l'Etraz in view of Cheah, disclose the relationship management system wherein each of the user collections includes a visibility field that specifies if a change made to a contact file within the user collection is to be shared with the firm collection (columns 20-21, lines 55-67 and 1-9, respectively, Cheah).

Regarding Claims 14,50,and 79, the combination of de l'Etraz in view of Cheah, disclose the relationship management system wherein each of the contact files includes a plurality of contact information fields and wherein the visibility flag specifies a visibility of one of the contact information fields (Fig.18J; columns 20-21, lines 55-67 and 1-9, respectively, Cheah).

Regarding Claims 15,51,and 80, the combination of de l'Etraz in view of Cheah, disclose the relationship management system wherein each of the contact files includes a plurality of contact information fields and wherein the visibility flag specifies a visibility of an entire contact file (Fig.18J; columns 20-21, lines 55-67 and 1-9, respectively, Cheah).

Regarding Claims 16 and 52, the combination of de l'Etraz in view of Cheah, disclose the relationship management system wherein the administration routine is further adapted to process the detected change to detect the addition of the first contact file for a contact within one of the user collections for which the second contact file already exists within the firm collection (columns 27-28, lines 53-67 and 1-6, respectively, Cheah).

Regarding Claims 17 and 53, the combination of de l'Etraz in view of Cheah, disclose the relationship management system wherein the administration routine is further adapted to process the detected change to detect a user request for an administrator to make a change to the firm collection (column 26, lines 37-44, Cheah).

Regarding Claim 69, the combination of de l'Etraz in view of Cheah, the relationship management system wherein each user collection is accessible by a different user (column 18, lines 28-39, Cheah) and further comprising a display routine stored on a computer-readable medium, wherein the display routine is adapted to display the data pertaining to different contacts stored within each user collection to the user having access to the user collection (Fig.18C; columns 16-17, lines 62-67 and 1-42, respectively, Cheah).

### ***Response to Arguments***

Applicant's arguments with respect to the newly amended claims have been considered but are moot in view of the new ground(s) of rejection.

### ***Conclusion***

Applicant's amendment necessitated the new ground(s) of rejection presented in this Office action.

Accordingly, **THIS ACTION IS MADE FINAL**. See MPEP § 706.07(a). Applicant is reminded of the extension of time policy as set forth in 37 CFR 1.136(a).

A shortened statutory period for reply to this final action is set to expire THREE MONTHS from the mailing date of this action. In the event a first reply is filed within TWO MONTHS of the mailing date of this final action and the advisory action is not mailed until after the end of the THREE-MONTH shortened statutory period, then the shortened statutory period will expire on the date the advisory action is mailed, and any extension fee pursuant to 37 CFR 1.136(a) will be calculated from the mailing date of the advisory action. In no event, however, will the statutory period for reply expire later than SIX MONTHS from the date of this final action.

***Points of Contact***

Any inquiry concerning this communication or earlier communications from the examiner should be directed to CHELCIE DAYE whose telephone number is (571)272-3891. The examiner can normally be reached on M-F, 7:00 - 4:30.

If attempts to reach the examiner by telephone are unsuccessful, the examiner's supervisor, Apu Mofiz can be reached on 571-272-4146080. The fax phone number for the organization where this application or proceeding is assigned is 571-273-8300.

Information regarding the status of an application may be obtained from the Patent Application Information Retrieval (PAIR) system. Status information for published applications may be obtained from either Private PAIR or Public PAIR. Status information for unpublished applications is available through Private PAIR only. For more information about the PAIR system, see <http://pair-direct.uspto.gov>. Should you have questions on access to the Private PAIR system, contact the Electronic Business Center (EBC) at 866-217-9197 (toll-free).

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April 24, 2008

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